10. Perform Quotation Management

10.1 Introduction

The “Quotation Management Screen” (PR604) summarizes the recorded vendor responses to an RFQ. The system will automatically display responses that are received via EDI. Responses that are received via mail, fax, oral conversation, etc. must be manually recorded on the “Response to Request for Quotations Screen” (PR612) before the system will display them on PR604.

10.2 Who Performs the Procedure

Each buyer will be responsible for entering non-EDI vendor response data applicable to his/her RFQ(s) and for reviewing, and managing the responses to those RFQ(s). Only responses related to a specific RFQ will appear on the “Quotation Management Screen” (PR604) at any given time.

10.3 Initiating the Process

The process begins when vendors reply to an open RFQ. Responses that are received via mail, fax, oral conversations, etc. must be manually recorded by the buyer on PR612. If responses are received via EDI, then the responses will automatically populate PR612. The buyer then reviews the responses on the PR604 screen.

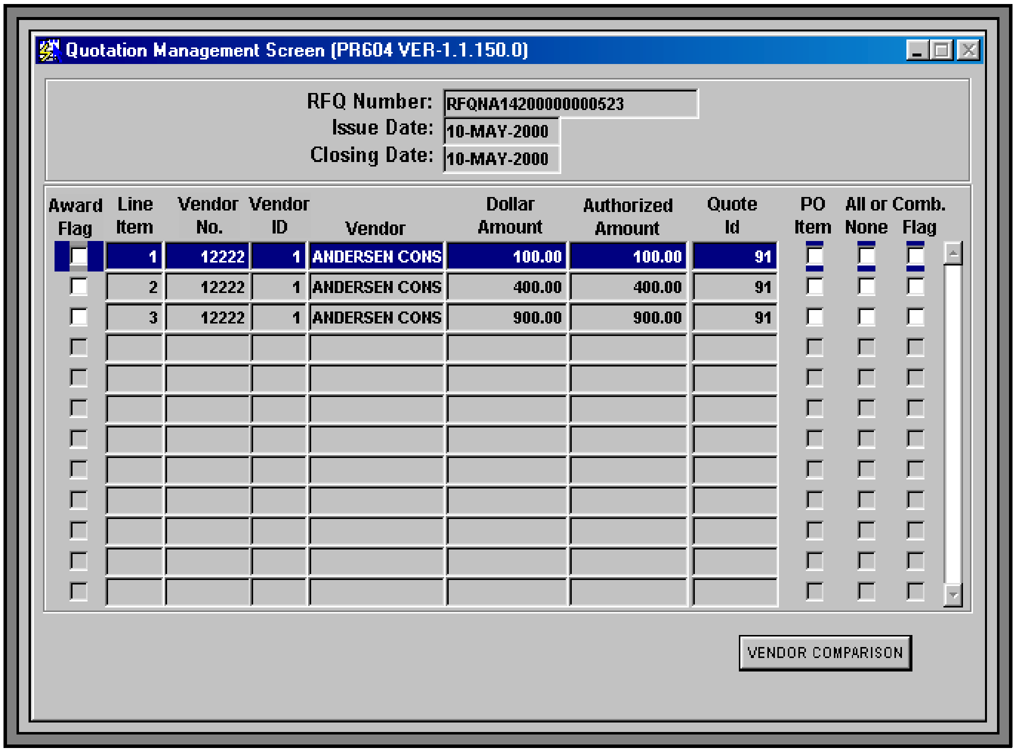
10.4 Accessing the System

From the Main Menu**,** select Transaction. From the Transaction menu, select Procurement. From the Procurement menu, select “PR606 - Request for Quotations”. On PR606, double click on the relevant RFQ number. The “Quotation Management Screen” (PR604) will appear. Follow the steps below for PR604 and PR612.

10.5 Recording a New Vendor Response

This procedure describes the steps necessary to access the "Response to Request for Quotation Screen" (PR612) and record a new vendor response.

PR604 - Quotation Management Screen

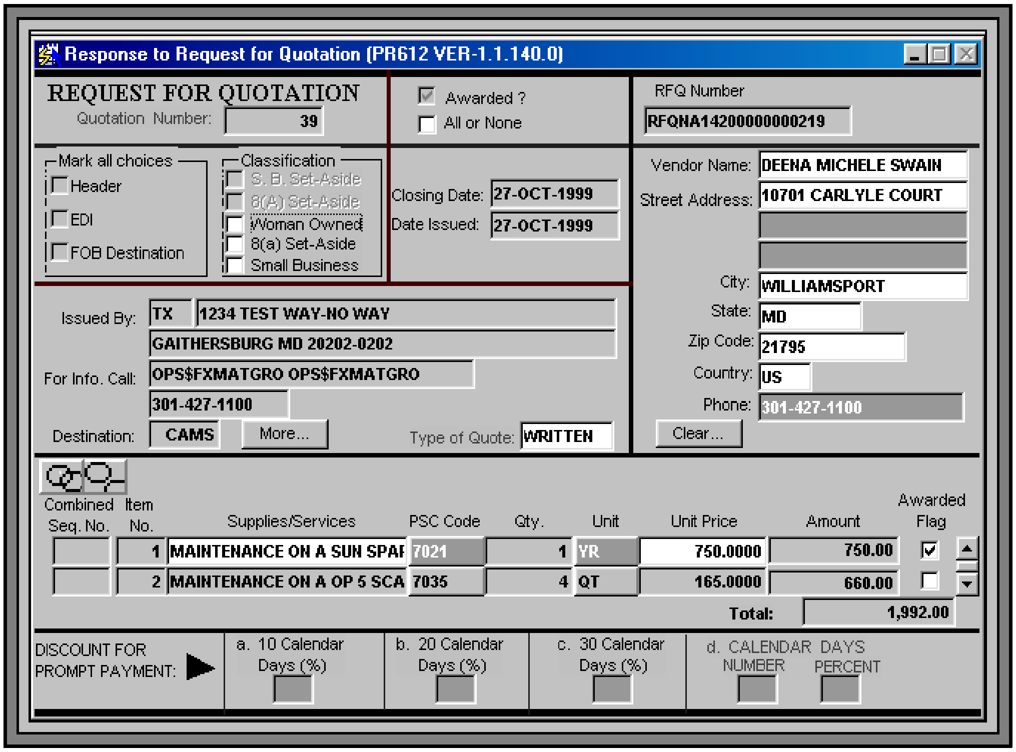


RFQ Number: RFQNA14200000000523
Issue Date: 10-MAY-2000
Closing Date: 10-MAY-2000

Award Flag	Line Item	Vendor No.	Vendor ID	Vendor	Dollar Amount	Authorized Amount	Quote Id	PO Item	All or None	Comb. Flag
☐	1	12222	1	ANDERSEN CONS	100.00	100.00	91	☐	☐	☐
☐	2	12222	1	ANDERSEN CONS	400.00	400.00	91	☐	☐	☐
☐	3	12222	1	ANDERSEN CONS	900.00	900.00	91	☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐
☐								☐	☐	☐

STEP	ACTION
PR606 - Response to Request for Quotation Screen	
1.	Double click on the RFQ in which a new vendor response should be recorded.
2.	PR604 appears.
PR604 - Quotation Management Screen	
3.	Click on the "Create Record" icon in the toolbar (i.e., the "green plus") to open the "Request for Quotation Screen" (PR612) in entry mode.

PR612 - Response To Request For Quotation Screen


Response to Request for Quotation (PR612 VER-1.1.140.0)

REQUEST FOR QUOTATION

Quotation Number: 39

☑ Awarded ?
☐ All or None

RFQ Number: RFQNA14200000000219

Mark all choices
☐ Header
☐ EDI
☐ FOB Destination

Classification
☐ S. B. Set-Aside
☐ 8(A) Set-Aside
☐ Woman Owned
☐ 8(a) Set-Aside
☐ Small Business

Closing Date: 27-OCT-1999
Date Issued: 27-OCT-1999

Vendor Name: DEENA MICHELE SWAIN
Street Address: 10701 CARLYLE COURT
City: WILLIAMSPORT
State: MD
Zip Code: 21795
Country: US
Phone: 301-427-1100

Issued By: TX 1234 TEST WAY-NO WAY
GAITHERSBURG MD 20202-0202
For Info. Call: OPS$FXMATGRO OPS$FXMATGRO
301-427-1100
Destination: CAMS
Type of Quote: WRITTEN

Combined Seq. No.	Item No.	Supplies/Services	PSC Code	Qty.	Unit	Unit Price	Amount	Awarded Flag
	1	MAINTENANCE ON A SUN SPAF	7021	1	YR	750.0000	750.00	☑
	2	MAINTENANCE ON A OP 5 SCA	7035	4	QT	165.0000	660.00	☐

Total: 1,992.00

DISCOUNT FOR PROMPT PAYMENT:
a. 10 Calendar Days (%)
b. 20 Calendar Days (%)
c. 30 Calendar Days (%)
d. CALENDAR DAYS NUMBER PERCENT

STEP	ACTION
PR612 - Response to Request for Quotations Screen	

STEP	ACTION
4.	In the **VENDOR NAME** field, double click on the field to access the current list of CFS vendors. Select the applicable vendor/address from the list and the relevant information will populate the vendor address fields. If the vendor or vendor address does not appear in the list-of-values, manually record the following: a. In the **VENDOR NAME** field, type in the vendor's name. b. In the **STREET ADDRESS** field, type in the vendor's address information. c. In the **CITY** field, type in the vendor's city. d. In the **STATE** field, type in the vendor's state or province. e. In the **ZIP CODE** field, type in the vendor's zip code (up to 10 characters). f. In the **COUNTRY** field, enter an abbreviation for the vendor's country. g. In the **PHONE** field, type in the phone number of a contract for the vendor. Note: If the vendor information is manually recorded on PR612, the vendor information must be added to the CFS vendor database (through PM002) before the vendor can be flagged for award. Note: This field must be completed prior to any other fields on this screen.
5.	In the **ALL OR NONE** check box, click on the field or press the space bar to indicate whether this vendor requires all items to be flagged for award together. If the vendor does not require all items to be flagged for award together, leave this check box blank. Note: This field will be reflected on PR604 and PR604 p2 screens.
6.	In the **WOMAN-OWNED** field, click on the field or press the space bar to insert a check and indicate that the vendor is woman-owned. If the vendor is not woman-owned, leave this field blank.

STEP	ACTION
7.	In the **8(a) BUSINESS** field, click on the field or press the space bar to insert a check and indicate that the vendor is an 8(a) Business. If the vendor is not an 8(a) Business, leave this field blank. In the **SMALL BUSINESS** field, click on the field or press the space bar to insert a check and indicate that the vendor is a Small Business. If the vendor is not a Small Business, leave this field blank.
8.	In the **TYPE OF QUOTE** field, double click to access the list-of-values. Choose either “Written” or “Oral”. Note: Responses received via EDI will default to ‘EDI’.
9.	In the **UNIT PRICE** field, record the unit price offered by the vendor for each line item. Note: If a vendor responds back with “All or None” option selected but has included a line item for free, the line item must have an entry in the unit price. If a vendor is not bidding on an item, then there should be no entry in the unit price field.
10.	The **AMOUNT** field is system generated for each line item. It calculates the total for each line item.
11.	The **TOTAL** field is system generated and is a summation of each line item’s **AMOUNT**.

STEP	ACTION
11a.	The **COMBINED SEQ NO** field allows the vendor to indicate if certain items must be flagged for award in combination. Thus, some items may be flagged for award only if all items in the combination are flagged collectively. To create a combination: a. Double click on the **COMBINED SEQ NO** for each line item to be combined. The line will turn yellow. b. When all items for a combination have been highlighted, click the **COMBINED** pushbutton (i.e. the Combined Links icon). A message will appear which denotes the number of rows selected for combination. (i) Click the "OK" button on the message and click the **COMBINED** pushbutton (i.e. the Combined Links icon). (ii) If the message is not correct, click the "OK" button on the message. Continue to combine line items until each line item that is supposed to be included in the combination is highlighted. Then return to 'Step b'.

STEP	ACTION
11b.	In order to uncombine a combination: a. Double click on the **COMBINED SEQ NO** for each line item to be uncombined. The line will turn yellow after being highlighted. b. When all items have been highlighted, then click the **UNCOMBINED** pushbutton (i.e. the Separated Links icon). A message will appear which denotes the number of rows selected to be uncombined. (i) Click the "OK" button on the message and then click the **UNCOMBINED** pushbutton (i.e. the Separated Links icon). (ii) If the message is not correct, click the "OK" button on the message. Continue to uncombine line items until each line item that is not supposed to be included in the combination is no longer highlighted. Then return to 'Step b'. Note: A number should disappear from the **COMBINED SEQ NO** field. Every new combination will have a sequential number. If a combination is uncombined, the other combination's numbers will not be re-sequenced. They will remain as they had originally been created.
12.	In the DISCOUNT FOR PROMPT PAYMENT block, enter percentages for the following (where provided by the vendor): a. In the **10 CALENDAR DAYS (%)** field, enter the discount percentage offered by the vendor if the invoice is paid within 10 days. b. In the **20 CALENDAR DAYS (%)** field, enter the discount percentage offered by the vendor if the invoice is paid within 20 days. c. In the **30 CALENDAR DAYS (%)** field, enter the discount percentage offered by the vendor if the invoice is paid within 30 days. d. In the **CALENDAR DAYS NUMBER** and **PERCENT** fields, enter special terms offered by the vendor.
13.	Click the "Note" icon on the toolbar to enter a note from or about the vendor.

STEP	ACTION
14.	Once the data is complete, click the “Exit” icon on the toolbar to return to PR604. If you are prompted with a message asking whether to save changes, click ‘Yes’ to save changes or ‘No’ to ignore changes.

10.6 Updating a Vendor Response

This procedure describes the steps necessary to access an existing vendor response in the “Response to Request for Quotations Screen” (PR612) in order to update vendor response information.

Note: This function is not applicable for responses that have been flagged for award (i.e. the Dollar icon has been clicked and it is disabled).

STEP	ACTION
1.	From the Quotation Management Screen (PR604), click once on a line item response from the vendor whose response needs updating. This line should turn blue.
2.	Click the “Update” icon in the toolbar (i.e., the “single page”) to open the “Request for Quotation Screen” (PR612) and display the selected vendor’s response in edit mode.
3.	After updating the response, click the “Exit” icon on the toolbar to return to the PR604 screen. If you are prompted with a message asking whether to save changes, click ‘Yes’ to save changes or click ‘No’ to ignore changes.

10.7 Viewing a Vendor Response

This procedure describes the steps necessary to view an existing vendor response in the "Response to Request for Quotation Screen" (PR612).

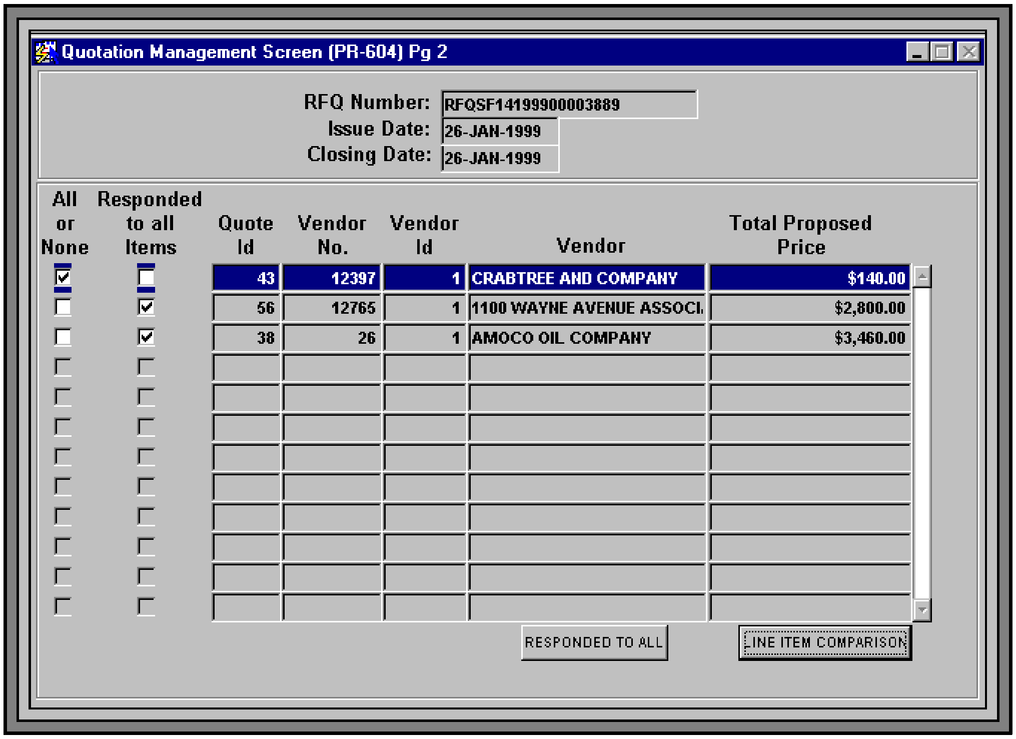
STEP	ACTION
1.	From the Quotation Management Screen (PR604), click once on a line item response from the vendor whose response needs viewing. This line should turn blue.
2.	Click the "View" icon in the toolbar (i.e., the "green magnifying glass") to open the "Request for Quotation Screen" (PR612) and display the selected vendor's response in read-only mode.
3.	After viewing the response, click the "Exit" icon on the toolbar to return to the PR604 screen.

10.8 Comparing Vendor Responses

This procedure describes the steps necessary to compare vendor's response(s) on the PR604 screens. Responses can be compared at three levels. On PR604, the responses can be compared on the line item level. On PR604 p2, responses can be compared at the vendor level, and on the "Responded to all items" level.

STEP	ACTION
PR604 - Line Item Comparison Screen	
1.	Vendor responses will be sorted by LINE ITEM.
2.	Line Items will then be sorted by increasing **DOLLAR AMOUNT**. Thus, the least expensive vendor response will appear first for each line item and the most expensive vendor response will appear last for each line item.
3.	The **ALL OR NONE** flag is derived from PR612. If a vendor has the **ALL OR NONE** flag checked on PR612, then all line items will have the **ALL OR NONE** flag checked on PR604. Otherwise, this flag will remain unchecked. This flag is not updateable on PR604.
4.	The **COMB. FLAG** is derived from PR612. If a vendor has any items included in a combination on PR612, then all items in the combination will be flagged on PR604. The PR604 screen does not differentiate between combinations. Thus, to determine which items have been combined for the vendor, the PR612 screen must be accessed.
5.	Click the VENDOR COMPARISON button to access PR604 p2 Screen (i.e., Vendor Comparison Screens)

PR604 Pg2 - Quotation Management Screen



RFQ Number: RFQSF14199900003889
Issue Date: 26-JAN-1999
Closing Date: 26-JAN-1999

All or None	Responded to all Items	Quote Id	Vendor No.	Vendor Id	Vendor	Total Proposed Price
☑	☐	43	12397	1	CRABTREE AND COMPANY	$140.00
☐	☑	56	12765	1	1100 WAYNE AVENUE ASSOCI	$2,800.00
☐	☑	38	26	1	AMOCO OIL COMPANY	$3,460.00
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					

STEP	ACTION
PR604 p2 - Vendor Comparison Screens (All Vendors)	
6.	The **ALL OR NONE** flag is derived from the PR612. If a vendor has the **ALL OR NONE** flag checked on the PR612, then all line items will have the **ALL OR NONE** flag checked on the PR604p2 screens. Otherwise, this flag will remain unchecked. This flag is not updateable on the PR604 p2 screens.
7.	The **RESPONDED TO ALL ITEMS** flag is based upon a vendor response entered on PR612. If a vendor has entered in a unit price for every item on the PR612, then this flag will be checked on PR604p2. Otherwise, it will remain unchecked. This flag is not updateable on the PR604 p2. Note: This flag can distinguish whether a vendor's low Total Proposed Price may reflect one line item's price as opposed to the cost of all line items, for example.
8.	By doubling clicking in the **VENDOR NO** field for a particular vendor, PR612 will become active. The screen will be populated with the response data for the vendor chosen in read-only mode. By then clicking the exit icon on PR612, PR604p2 will become active once again.

STEP	ACTION
9.	The **TOTAL PROPOSED PRICE** is derived from the **TOTAL** field on PR612. It is the summation of all unit prices entered for each line item. The vendors are sorted in ascending order based upon the **TOTAL PROPOSED PRICE**.
10.	Click the **RESPONDED TO ALL** button to access the second page of the PR604 p2 Screen (i.e., Vendor Comparison Screens)
PR604 p2 - Vendor Comparison Screens (All "Responded to All" Vendors)	
11.	The **ALL OR NONE** flag is derived from the PR612. If a vendor has the **ALL OR NONE** flag checked on the PR612, then all line items will have the **ALL OR NONE** flag checked on the PR604 p2. Otherwise, this flag will remain unchecked. This flag is not updateable on the PR604 p2.
12.	The **RESPONDED TO ALL ITEMS** flag is based upon a vendor response entered on PR612. On this screen, the **RESPONDED TO ALL ITEMS** flag will always be checked, since this screen depicts only those vendors who have entered in unit prices for every line item. This flag is not updateable on the PR604 p2.
13.	The **TOTAL PROPOSED PRICE** is derived from the **TOTAL** field on PR612. This screen will sort only those vendors who have entered in unit prices for each line item and thus the **TOTAL PROPOSED PRICE** will be sorted in ascending order, accordingly.
14.	Click the **ALL VENDORS** button to access the first page of PR604 p2 Screen. Otherwise, click the **LINE ITEM COMPARISON** button to return to the PR604 Screen (The Main Screen).

10.9 Awarding a Vendor Response

This procedure describes the steps necessary to flag the winning vendor's response(s) for award.

STEP	ACTION
1.	From the Quotation Management Screen (PR604), click on the AWARD FLAG to select a line item from the vendor whose response you wish to award. Note: If any of the line items are above tolerance, the system will warn the buyer with a pop up message. Click "OK" on all tolerance messages, they do not effect the process of flagging the response for award. However, when these items are pulled onto a purchase order, if the line item(s) that exceed tolerance are included, then the purchase order will not be approved.

STEP	**ACTION**	
	IF...	**THEN...**
1a.	The line item is part of a combination...	a. A message will appear that all line items in this combination must be flagged for award. b. By clicking “OK” on the message, all items in this combination will be automatically flagged for award. c. If you choose not to flag this line item for award, then uncheck the **AWARD FLAG** beside the line item. d. A message will appear that all line items in this combination will no longer be flagged for award. e. By clicking “OK” on the message, all items in this combination will be automatically unchecked and thus not flagged for award.

STEP	**ACTION**	
	IF...	**THEN...**
1b.	The vendor is an “All or None” Vendor...	a. A message will appear upon clicking the **AWARD FLAG** that all line items for this vendor must be flagged for award. b. By clicking “OK” on the message, all line items for this vendor (with unit prices entered) will be automatically flagged for award. c. To not flag the line item for award, then uncheck the **AWARD FLAG** beside the line item. d. A message will appear that all line items for this vendor will no longer be flagged for award. e. By clicking “OK” on the message, all items for this vendor will be automatically unchecked and thus not flagged for award.
	Note: An “All or None” Vendor does not need to have a unit price entered for every line item on PR612. However, to flag the RFQ for award by clicking on the “Award” icon, all items must have unit prices entered. Thus, another vendor will have to be flagged for award for the particular line item(s) that the “All or None” Vendor did not price.	

<table>
<tr><th>STEP</th><th colspan="2">ACTION</th></tr>
<tr><td></td><td colspan="2">Note: Conflicts may also arise which force the buyer to select whether to award to an “All or None” Vendor or to flag an item for award that is in a combination.
Note: For example, if a vendor is an “All or None” Vendor but has not entered a unit price for one item, then this item is still available to be flagged for award by a different vendor. There may be conflicts, though, if the other vendor has this line item in combination with another line item.</td></tr>
<tr><th></th><th>IF...</th><th>THEN...</th></tr>
<tr><td rowspan="2">1c.</td><td>The above example is true...</td><td>a. A message will appear which states that the buyer will have to select either the “All or None” Vendor or the item in a combination.
b. The buyer will then have to choose whether to flag the “All or None” Vendor for award or to unflag the “All or None” Vendor so as to be able to flag the combination items instead.</td></tr>
<tr><td colspan="2">If the scenario were reversed and a combined item had been flagged for award, then an “All or None” Vendor could not be flagged for award. For instance, if the RFQ contained 4 line items and the first two line items were combined and flagged for award to vendor 1, then line items 3 and 4 could not be flagged for award to a “All or None” Vendor. The buyer would then have to decide which offer or combination is in the best interest of the government.</td></tr>
<tr><td>2.</td><td colspan="2">The vendors can be flagged for award (i.e., clicking the $ icon) on either the PR604 or PR612.</td></tr>
</table>

STEP	**ACTION**	
	IF...	**THEN...**
	The buyer is flagging the response on PR604...	a. Click the "Award Flag" next to the line item/items that are to be flagged for award. b. Click the "Award" icon on the toolbar (i.e., the "dollar sign") to flag the vendor responses to this RFQ for award. c. A message confirming the award will appear on the screen. d. Click 'Yes' to award the quotation(s) or 'No' to cancel the award process. Note: An RFQ may be partially flagged for award by flagging only a portion of the line items for award and then clicking the "Award" icon. To fully flag the RFQ for award, repeat the steps above for the remaining line items.
	The buyer is flagging the response on PR612...	a. Click the "Award" icon on the toolbar (i.e., the "dollar sign") to flag the current vendor's responses to this RFQ for award. b. A message confirming the award will appear on the screen. c. Click 'Yes' to award the quotation(s) or 'No' to cancel the award process.

STEP	ACTION
3.	Note 1: The system will not allow the RFQ to be awarded prior to the closing date (i.e., the “Award” icon will be disabled). Note 2: Once the award process is complete, the “Create” and “Update” icons on the toolbar on PR604 will be disabled. To view the response information on PR612 at a later date, the buyer must use the “View” icon on the toolbar on PR604. Note 3: If any of the line items are above tolerance, the system will warn the buyer with a pop up message. Click ‘OK’ on all tolerance messages, they do not effect the process of flagging the response for award. However, if these items are pulled onto a purchase order, they will fail tolerance and the purchase order will not be approved. One possible solution is that a new requisition with replacement line items could be created for the specific line items that exceed tolerance.
4.	After awarding the response, click the “Exit” icon on the toolbar one time to return to the PR606 screen and then again to return to the Main Menu.
5.	After the response is flagged for award, no changes can be made to PR604 or PR612. You may view the responses on these screens in read-only mode.

10.10 Unawarding A Line Item on an RFQ

This procedure describes the steps necessary to unflag a line item on an RFQ for award.

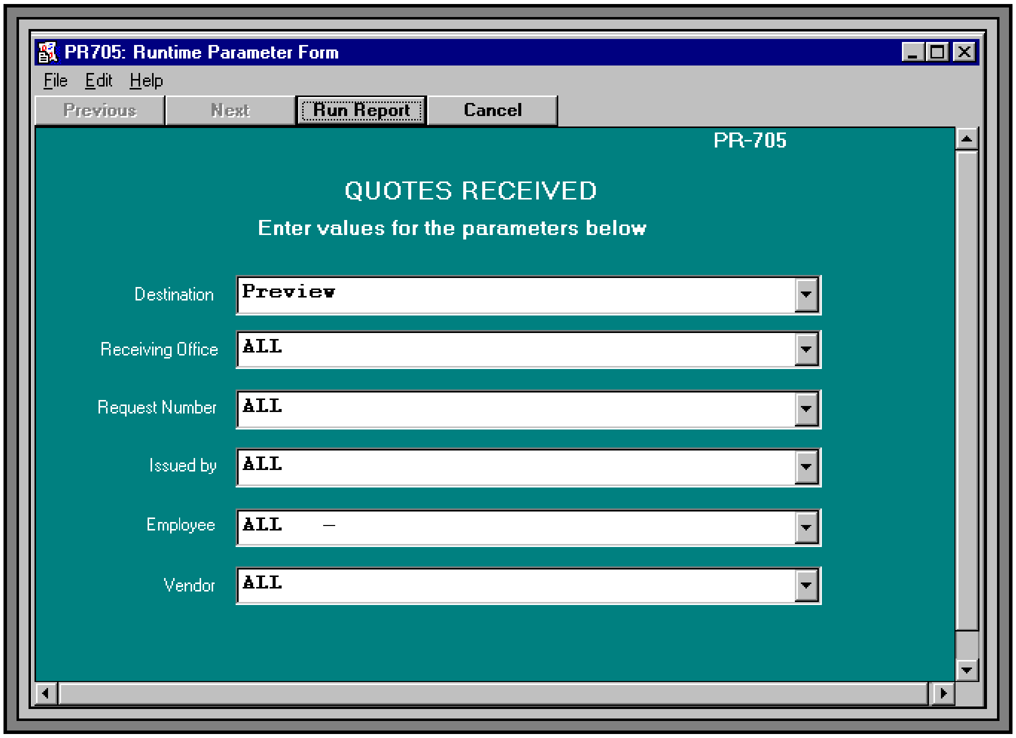
STEP	ACTION	
1.	Determine whether the **PO ITEM** check box is checked for the line item in question.	
	IF...	**THEN...**
2.	If the **PO ITEM** check box is unchecked for the line item in question...	Uncheck the “Award Flag”. A different vendor response will now be able to be flagged for award using the same procedures outlined in Section 10.9 “Awarding a Vendor Response”.

STEP	ACTION	
3.	If the PO ITEM check box is checked for the line item in question...	a. Access the “Purchase Order Preview Screen” (FMR041) and determine with which purchase order the line item has been associated. b. View the purchase and verify that the purchase order has not been approved. If the purchase order has not been approved, proceed to Step C. If the purchase has been approved, the line item will NOT be able to be unawarded on the RFQ. c. View the purchase order and access the “Purchase Order - Line Item” (FM041p2) screen and verify that no action has been taken on the line item. If no action has been taken on the line item, proceed to Step D. If action has been taken on the line item, it will NOT be able to be unawarded on the RFQ. d. Remove the line item from the purchase order by clicking the “RED X” icon. e. Return to the “Quotation Management Screen” (PR604) and uncheck the “Award Flag” for the line item.
4.	The line item may now be flagged for award to a different vendor.	

10.11 Printing (Running) the SF-18 Quotes Received Report

This procedure describes the steps necessary to run the "PR705 - SF18 Quotes Received" report.

PR705 - Runtime Parameter Form (SF18 Quotes Received)


PR705: Runtime Parameter Form
File
Edit
Help
Previous
Next
Run Report
Cancel
PR-705
QUOTES RECEIVED
Enter values for the parameters below

Destination	Preview
Receiving Office	ALL
Request Number	ALL
Issued by	ALL
Employee	ALL –
Vendor	ALL

STEP	ACTION
1.	To run the "PR705 - SF18 Quotes Received" report, a. Click the "Printer" icon in the toolbar while either the PR612 or PR604 window is open and active, or b. From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select "PR705 - SF18 Quotes Received".
PR705: Runtime Parameter Form	

STEP	ACTION
2.	To select the destination of the report, click the pull down menu in the **DESTINATION** field and select the appropriate destination: a. To view the report on the screen, select “Screen”. b. To send the report to a specific file, select “File”. c. To send the report to the printer, select “Printer”. d. To send the report to a mail file, select “Mail”. e. To view the report on the screen, select “Preview”. After selecting the destination, go to Step 3.
3.	To run a report for a specific receiving office, click the pull down menu in the **RECEIVING OFFICE** field and select the appropriate receiving office. Note: To run a report for all receiving offices, select “All”.
4.	To run a report that contains a specific request for quotation number, click the pull down menu in the **REQUEST NUMBER** field and select the appropriate request for quotation number. Note: To run a report for all requests, select “All”.
5.	To run a report that contains a specific contracting office which has issued the request, click the pull down menu in the **ISSUED BY** field and select the appropriate contracting office. Note: To run a report for all contracting offices, select “All”.
6.	To run a report for a specific employee who created the request, click the pull down menu in the **EMPLOYEE** field and select the appropriate employee. Note: To run a report for all employees, select “All”.
7.	To run a report for a specific vendor, click the pull down menu in the **VENDOR** field and select the appropriate vendor. Note: To run a report for all vendors, select “All”.
8.	Click the “RUN REPORT” pushbutton to execute the selection made. Proceed to Step 10.

STEP	ACTION
9.	Click the “CANCEL” pushbutton to cancel the report selections made. Note: Upon clicking the “CANCEL” button the Runtime Parameter Form will close and exit the user to the last active screen.

STEP	ACTION	
	IF...	**THEN...**
10.	The destination selected is "Screen" or "Preview"... and The "RUN REPORT" pushbutton is clicked...	a. To go to the next page of the report, click the "NEXT" pushbutton. b. To go to the previous page of the report, click the "PREV" pushbutton. c. To go to the last page of the report, click the "LAST" pushbutton. d. To go to the first page of the report, click the "FIRST" pushbutton. e. To go to a specific page of the report, enter the page number and then click the "PAGE" pushbutton. f. To print the report, click the "PRINT" pushbutton. g. To send the report to a mail file, click the "MAIL" pushbutton. This functionality is currently not available. h. To close the report, click the "CLOSE" pushbutton. i. To open a second report window, click the "NEW" pushbutton.